

webTA 3.7

Basics

Document History

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About working in the webTA environment

webTA is an Internet- or intranet-based application that differs from many computer applications you may be accustomed to using, such as spreadsheets and word processors, because some of the processing in webTA is done on your computer and some is done on a server. Therefore, the way you work with webTA differs in some ways from strictly computer-resident applications.

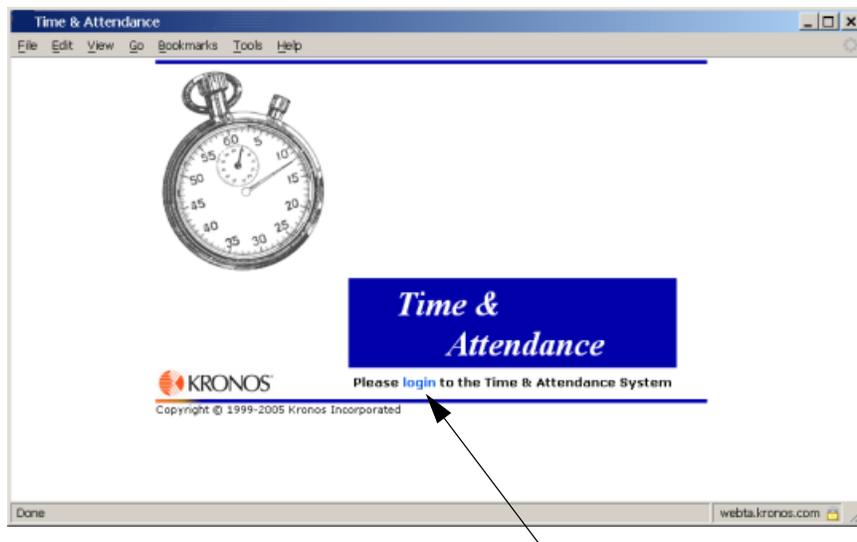
IMPORTANT! This document contains graphical representations (“screen shots”) of many of the browser pages that you will see as you use webTA. These screen shots may not appear exactly like the pages on your own screen. They may differ in some ways, depending, for example, on how webTA is configured for your site and job role. However, the screen shots in this document are similar enough to what you will see so that they can help you work through the procedures and understand the examples in these documents.

Logging in and out

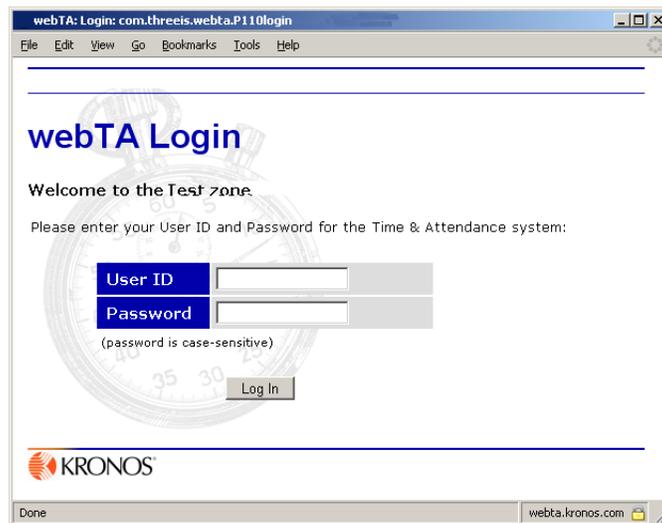
Access to webTA data is controlled using user IDs and passwords.

To log in:

1. If you have not already done so, open webTA.
2. Click **login** on the opening page.



The webTA Login page opens.



3. Type your user ID and password in the appropriate boxes, then click **Log In**.

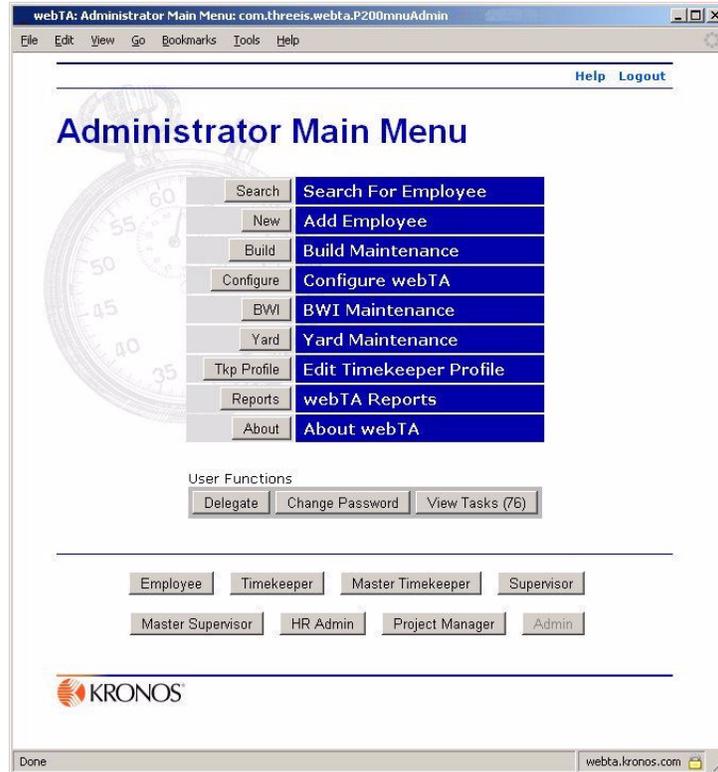
IMPORTANT!:

- If you see an error message when you try to log in, first ensure that you typed your information in the correct case and in accordance with your organization's policies, if applicable. (webTA passwords and user IDs are case-sensitive.)
- If you see an error message after subsequent log in attempts, get help from a system administrator.
- After several unsuccessful log in attempts, you may be locked out of the system. See your Timekeeper, HR Administrator, or Administrator to have your password reset.

When you've successfully logged in, webTA opens your main menu page.

IMPORTANT: The options available on your own main menu page depend on your job function and on the highest levels of privileges you are authorized for. Therefore, not all of the options and fields you see in the example will necessarily appear on your own main menu. Your page will look similar to this example, though.

Here is an example of the main menu page for an Administrator:



To log out:

A **logout** link appears on all pages other than the login page.

Click **Logout** in the upper right corner of the page:



webTA returns you to the webTA Login page.

Navigating in webTA

If you are accustomed to using a Web browser, the webTA interface should be familiar to you. The biggest difference is that you should not use the “forward” and “back” buttons, menu items, or arrows in your browser. Instead, use the navigation buttons in the webTA pages, such as **Return**, **Save**, **Cancel**, and **Next**.

IMPORTANT! If you use the “forward” or “back” buttons, menu items, or arrows on your browser tool bar instead of on the webTA page, you may lose data or be logged out.

Press the Tab key on your keyboard to move from one field to another, or use your mouse to point and click on a field.

About webTA and employee roles

All employees have roles assigned to them. Some employees may have more than one role. Consequently, various access options and functions may be available to them in webTA.

Given these various roles and responsibilities, your experience using webTA (the functions available, which pages you can access, and how these pages appear) will differ compared to those who have different roles.

Employee

Employees enter daily time and attendance data, some leave and pay request data, and personal contact information, and perform other personal functions such as changing passwords and making time change requests.

Administrator

Administrators handle webTA system maintenance functions, and may access some basic data about employees (but not T&A data).

Administrators can also:

- Add new employees
- Maintain builds
- Configure webTA
- Import employee data files
- Generate reports

Timekeeper

Timekeepers edit or correct T&A data, addresses, phone numbers, and e-mail addresses, and reset passwords for their assigned employees.

Master Timekeeper

Master Timekeepers can perform the same functions as Timekeepers. In addition, they can change an employee’s agency and override validations.

Some Master Timekeeper role assignments are agency-specific, restricting their functions to those in their own agencies. Also, some Master Timekeeper roles are read-only role, restricting those assigned to it to viewing employee data, but not adding to, removing, or changing it.

Supervisor

Supervisors review and certify T&A records and leave or premium pay requests for their assigned employees. Also, some Supervisors roles lets them certify their own time cards.

Master Supervisor

Master Supervisors can certify T&A reports for all employees in webTA before their data is sent to NFC for payroll processing (though this is not required if supervisors have already completed the task).

Some Master Supervisor role assignments are agency-specific, restricting their functions to those their own agencies

Project Manager

Project Managers create, modify, and deactivate projects, including adding individual employees or groups of employees to projects, adding subprojects to projects, and tracking hours charged to projects.

HR Administrator

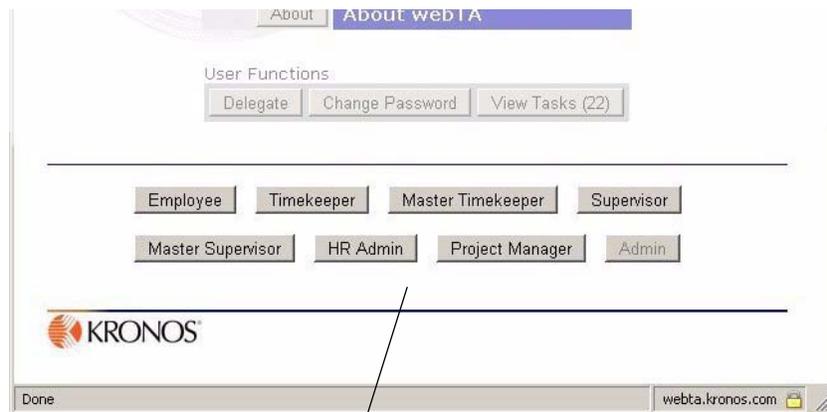
HR Administrators manage employees and leave transfer programs.

About main menu page role buttons

The buttons at the bottom of the page, below the **User Functions** section, provide access to functions associated with the roles each person is set to fulfill.

Every employee has at least one role button, the **Employee** button. Employees who have additional roles, such as Supervisor or HR Administrator, will have additional role buttons. The Administrator role has a button for every role in webTA.

Here are the role buttons for an Administrator:



Administrator role buttons

Those who perform the Project Manager role performs two roles, Employee and Project Manager. Therefore, they see buttons only for those roles.

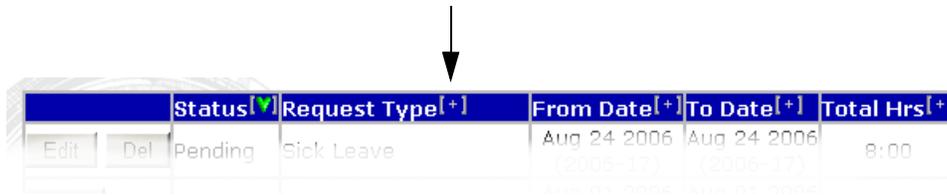


Project Manager role buttons

Which role buttons you see depends on which roles you are delegated to perform. For example, persons with only the Employee role have one role button. Clicking a role button opens the main menu page for that role. (Note that the button for the role you are currently working under is dimmed.)

Sorting lists

Many webTA pages have lists of items in a table format. Most of these lists can be sorted by clicking the sort icon at the top of a column.

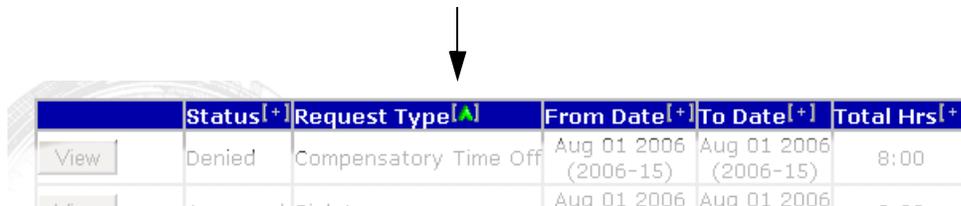


Clicking a sort icon for a column sorts the entire table by row, not just the items in a column.

To sort a list by column:

1. Click the [+] in the header of the column you want to sort by.

The sort icon changes from the plus sign to a green arrow.



2. To sort in descending order, click the arrow so that it points down.

- OR -

To sort in ascending order, click the arrow so that it points up

Entering work hours

One of the most common tasks you will perform is entering hours worked. The format for hour entries is HH:MM where HH is the number of hours and MM is the number of minutes, separated by a colon.

Minutes should be recorded in 15-minute increments (00, 15, 30, or 45).

You may also enter time in the format HH.MM where HH is the number of hours and MM is the decimal fraction of an hour, separated by a decimal point. The system automatically converts time entered this way to the HOURS:MINUTES format, and rounds the entry to the nearest 15-minute increment. For example, 2.5 is converted to 2:30 (two hours and 30 minutes) and 4.1 is converted to 4:00 (four hours, because the tenth of an hour is 6 minutes, so it is rounded down).

As you enter values, some basic checks are performed. When the system encounters data it identifies as incorrect, it displays an error message indicating the cause of the problem.

The primary T&A validation process is completed after all data is entered for a pay period and you click **Validate**. Once validated, the data may be certified correct by the Supervisor.

Exiting from webTA

When you are finished using webTA, exit properly by clicking **Logout** at the top right of the page. Exiting this way action ensures that your work is saved and that you are no longer connected to webTA. If there is no **Logout** button on a page, complete your task. Saving your work will return you to a page with a **Logout** button.

About system time-outs

Typically, an installation of webTA has a session time out set on the server. If you are logged in and leave webTA open for an extended period, your session will expire and you will be logged out of the application. This security feature prevents others from using your webTA account.

If your session times out, log back into webTA to continue.

Getting help

Every webTA page has an associated help page.

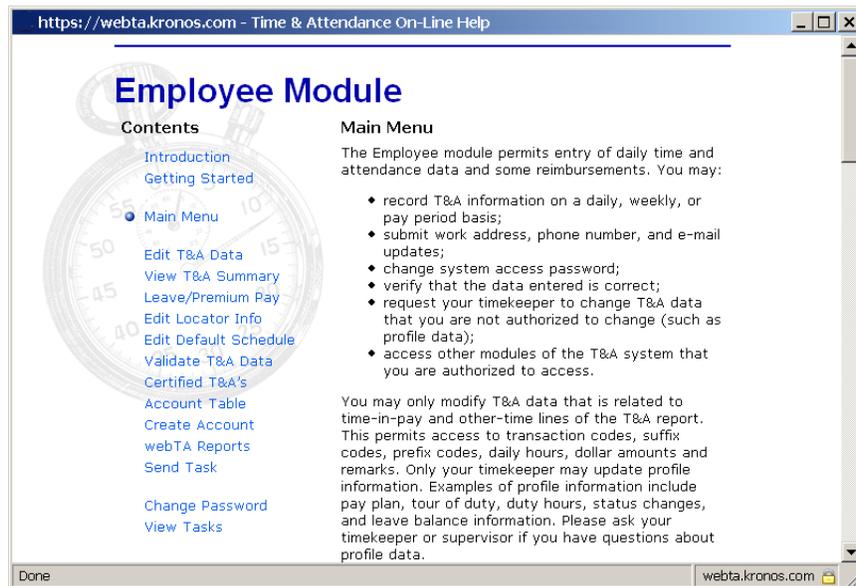
To get help:

1. Click **Help** in at the upper right of the window next to the **Logout** link.



The help for the webTA page opens.

Here is an example of the help page that opens from the Employee Main Menu page:



2. Find the help you need by clicking the help subject links in the **Contents** column.

Note that most windows in the help system are scrolling windows. Scroll down to reveal more topic information.

3. When you are finished, close the help window by clicking  on the browser title bar.

Searching for employees

Main menu pages other than the Employee Main Menu page provide access to webTA's search function for finding employees.

The Search for Employee page provides the capability to search for employees. From this page, the you can search by:

- Last name
- First name
- Social Security number (if your system is configured for this option)

IMPORTANT! Depending upon your job function, you may also be able to search by an employee's:

- T&A type
- Pay period
- Status
- Timekeeper
- Supervisor

Here is the Search for Employee page for Administrators:

The screenshot shows a web browser window titled "webTA: Search for Employee: com.threeris.webta.P239searchUser". The page has a "Help Logout" link in the top right. The main heading is "Search for Employee". Below the heading are four input fields: "Employee's Last Name", "Employee's First Name", "Employee's SSN", and "Status". The "Status" field is a dropdown menu with "Active" selected. At the bottom of the form are "Search" and "Cancel" buttons. The Kronos logo is visible at the bottom left of the page content. The browser's status bar shows "Done" and the URL "webta.kronos.com".

Here is the Search for Employee page for supervisors:

The screenshot shows a web browser window titled "webTA: Search for Employee: com.threeris.webta.P539searchUser - Microsoft Internet Explorer". The page has a "Help Logout" link in the top right. The main heading is "Search for Employee". Below the heading are six input fields: "Employee's Last Name", "Employee's First Name", "Employee's SSN", "Search Organization", "Supervisor", "T&A Type", and "Pay Period". The "Supervisor", "T&A Type", and "Pay Period" fields are dropdown menus, all with "All" selected. At the bottom of the form are "Search" and "Cancel" buttons. The Kronos logo is visible at the bottom left of the page content. The browser's status bar shows "Done" and the URL "webta.kronos.com".

To search for an employee, type the employee's information in the appropriate boxes and select from the drop-down lists, when available, then click **Search**.

Also, if the Search for Employee page has fields that have default values (such as Active for the Status field), you may search without typing in first and last names or the Social Security Number.

NOTE: To search by Social Security number, you must enter a complete SSN. (Social Security numbers may be typed without hyphens, spaces, or other separators.)

Keep these things in mind when searching for employees:

- All searches (except Social Security number) use *fuzzy matching*. For example, a search for users with last name of *Joh* matches *Joh*, *Johnson*, and *Johansen*.
- An alphabetical range can also be provided when searching on the last name. For example, 'c-h' returns users with last names starting with characters c through h.
- You can also use the wildcard character % to represent one or more letters. For example, searching for b%a returns all names starting with b and ending in a, such as Barbara and Benneta.
- Search criteria can be specified to search for either active or inactive users, if that option is available. This can be used to select an inactive user for reactivation. Inactive employees are those who worked for your agency in the past and have records in the webTA database. You can reactivate them instead of creating a new record for them.
- If you are a Timekeeper and are a delegate for more than one Timekeeper, or if they are both an actual Timekeeper and another Timekeeper's delegate, you can configure the search to only display employees assigned to a particular Timekeeper.
- If available, the **T&A Type** field lets you limit T&A records to those records meeting one of these criteria.
 - *Corrections* displays T&A records in the system that are correction records.
 - *Unvalidated* displays records that have not been validated by either the employee or the Timekeeper.
 - *Validated* displays records that have been validated by the employee or the Timekeeper, but which have not yet been certified by the Supervisor.
 - *Certified* displays records that have been both validated and certified, but not yet built.
 - *No Profile* displays records for which no T&A profile data has yet been stored. Records must have T&A profile data recorded before time can be entered for that record.
- If available, the **Pay Period** field lets you restrict the records displayed by the pay period.
 - *Current* matches records for the current pay period.
 - *Previous* matches records for the previous pay period that are typically completed records that need to be certified and built.
 - *Older* matches records not in the current or previous pay periods.

Viewing tasks

The Task List page shows both system-generated and user request messages. If webTA is configured to send tasks via e-mail, tasks appear on both the Task List and in e-mail, or on the Task List only, when e-mail notification fails. (Your Administrator sets which option is used.)

When you have tasks, the number of tasks you have appears in parentheses on the **View Tasks** button.



To view your task list:

1. On the Administrator Main Menu page, click **View Tasks**.

The **Task List** page opens listing your tasks.



- The **From** column shows the source of the message.

- The **Date/Time** column shows the date and time the task was added.
- The **Type** column shows the class of message.
- The **Description** column shows the text of the message.

Some task messages are informational, but some require action.

2. If you want to remove a message from your task list, click **Clear** next to the message.

- OR -

If you want to clear all tasks from the page you are viewing, click **Clear This Page**.

- OR -

If you want to clear all tasks in your task list, click **Clear All**.

IMPORTANT! You should not clear messages until you have taken the appropriate action required by the message.

Changing your password

Change your password regularly, and never reveal your password to anyone.

Passwords should not be easy to guess. Avoid using spouse's, children's and pets' names, birthdays and other significant dates, or any name or number easily associated with yourself. (The best passwords are random alphanumeric strings.)

If you lose or forget your password, your Timekeeper, HR Administrator, or Administrator can force a new password on your account, but they cannot look up your current password.

If your organization has password policies, they may be enforced in webTA. Some password policies may require:

- A minimum length
- Both alphabetic and numeric characters
- Upper and lower case characters
- Special characters

Some policies may also prohibit passwords derived from common words or alphanumeric sequences.

Also, passwords may expire after a specific period, and may not be reused for a specific period or for a specific number of password changes.

To change your password:

1. On your main menu page, click **Change Password**.
2. The change password page opens.

Here is the Change Password page for an employee:



3. Type in your current password in the **Current Password** box, then type your new password in the two **New Password** boxes.

Retyping the new password helps ensure against typing errors.

4. Click **Save**.